Employee set up for Medicare Overview

This Job Aid provides guidance on the actions a Benefits Administrator (BA) must take on the Benefits Personal Data page and the ACA Employee Eligibility Page before enrolling an employee in Medicare benefits.

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The Benefits Personal Data Page

Before enrolling an employee in Medicare Benefits, the Agency BA must complete the information shown on the **Benefits Personal Data** page.

1. Access the **Benefits Personal Data** page using the following path:

    Navigator > Benefits > Employee/Dependent Information > Benefits Personal Data

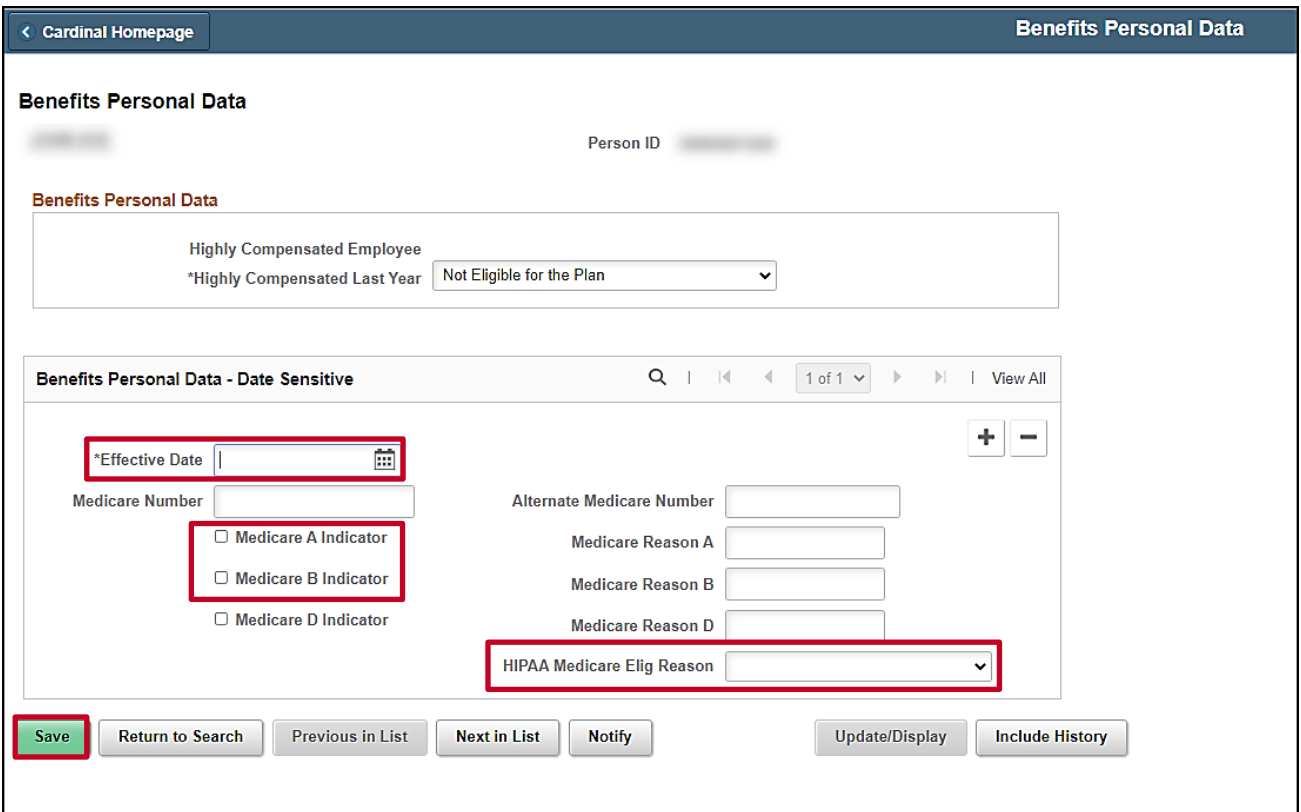The **Benefits Personal Data Search** page displays.

2. Enter the Employee ID in the **Empl ID** field.

    Note: You can also search by entering the beginning of the Name, or other search criteria using the corresponding drop-down options. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. Cardinal security restricts the user to seeing only their agency employees.

3. Click the **Search** button.

The **Benefits Personal Data** page refreshes with the employee's information.

4. Enter the first of the month in which the employee is eligible for Medicare in the **Effective Date** field on the **Benefits Personal Data** page.

5. Check the boxes next to **Medicare A** and **Medicare B**.

   Note: Both need to be checked for the employee to be enrolled in Medicare.

6. Select the corresponding **HIPAA Medicare Elig Reason**:

   a. Age

   b. Disability

   Note: The Eligibility Reason of End Stage Renal is only to be used by OHB when the employee is in a Non-Medicare Plan and Medicare is Primary.

7. Click the **Save** button.

   Note: Now navigate to the **ACA Employee Eligibility** page to complete the ACA status for the Medicare enrolled participants. (follow steps below)
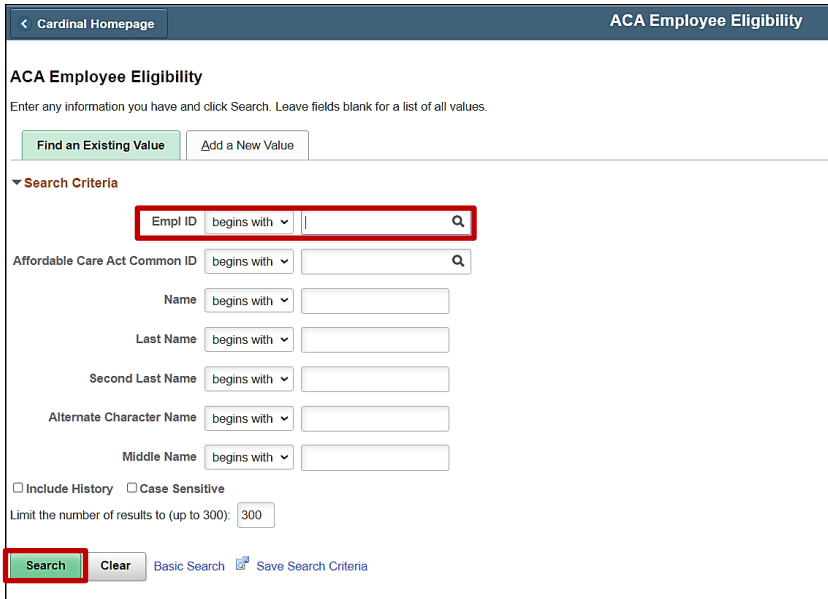
The ACA Employee Eligibility Page

Before enrolling an employee in Medicare Benefits, the Agency BA must complete the information shown on the **Benefits Personal Data** page.

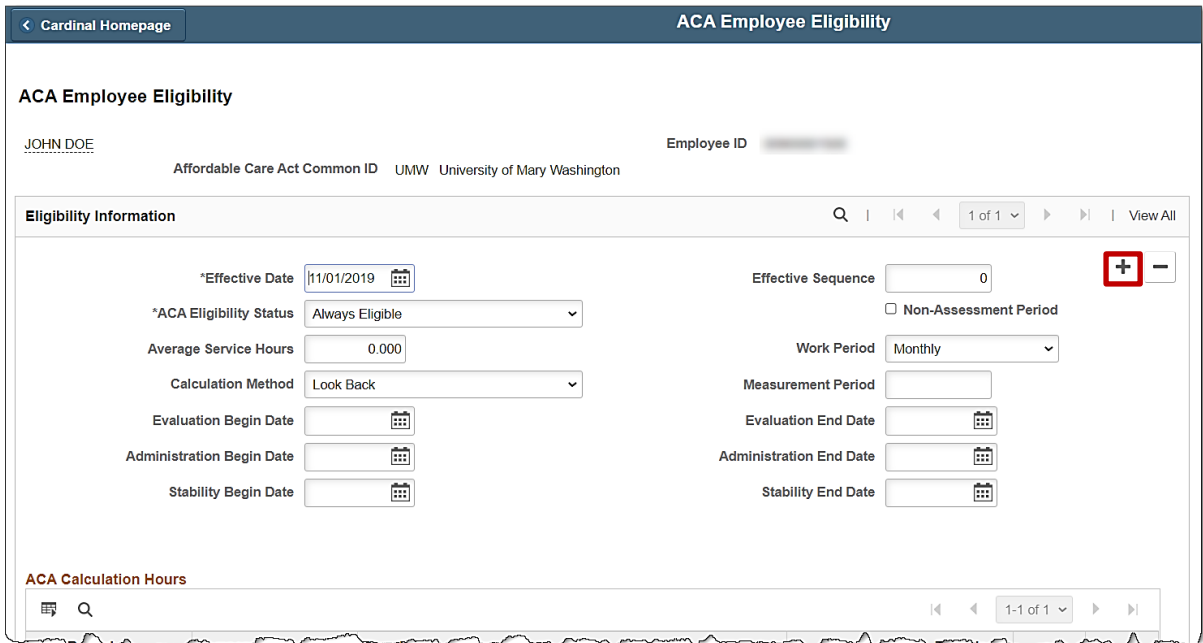1. Access the **ACA Employee Eligibility** page using the following path:

   Navigator > Benefits > Employee/Dependent Information > ACA Employee Eligibility

The **ACA Employee Eligibility Search** page displays.

2. Enter the Employee ID in the **Empl ID** field.

3. Click on the **Search** button.

The **ACA Employee Eligibility page** displays with the employee's information.

4. Click on the "**+**" button to add a new row.

The **ACA Employee Eligibility** page refreshes with a new row.

5. The Effective Date will default to the current date. Change the **Effective Date** to be the top of the month in which the employee is being enrolled in Medicare.

6. Select **Excluded** from the drop-down menu next to **Eligibility Status**.

7. Click the **Save** button.